

DSA's Custom Projects • A Partial List

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Needs Analysis Projects by DSA

Auspex Systems, Inc.

Needs Assessment, Job Analysis, and Modular Curriculum Design

DSA conducted a Needs Assessment, Job Analysis, and Modular Curriculum Design for Auspex Systems, Inc. The Customer Service Organization lies at the heart of Auspex's core corporate-wide value of providing the best customer service in the Network File Server Database industry. The Needs Assessment was conducted in order to provide both training and non-training recommendations addressing the challenges faced by the Technical Support Engineers whom serve as front line customer service representatives for Auspex. The TSE position was examined through a comprehensive Job Analysis in an effort to specify the skills, knowledge, and tasks required for the position, then a Modular Curriculum Design was developed from those findings. The Needs Assessment and TSE Job Analysis led to the development of the Auspex TSE Procedures Guide.

Training Development

Out of the needs/job analysis, two training priorities were identified to start the formalized training process:

- The Core Analysis Module (self-instructional) *and*
- TSE Procedures Guide

The TSE (Technical Service Engineer) Procedures Guide would be designed to contain procedures on the following:

Queue Management, Receiving And Logging In Calls, Problem Analysis And Resolution, Case Hand-off, Case Closure, Global Problem Resolution (AOR), Professional/Technical Development

Cisco Systems Needs Assessment

DSA was contracted to perform a needs assessment for the selection of delivery systems for training materials. The DSA formal needs assessment process was used, then expert opinion was provided in two ways: first as input to the selection of the delivery system, given Cisco Systems particular context, and secondly, in terms of the design elements and management system necessary for the successful implementation of the selected delivery system.

A design document including the elements of how the delivery system will function and will be managed, a listing and description of the design elements necessary for the success of the chosen delivery system, and a flow diagram showing how the user will access, use, and gain credit for the completion of the training was one of the deliverables for this project.

Sun-Linux Needs Analysis

Situation

For more than ten years, Sun Microsystems exclusively supported its internally developed operating system, Solaris. When Sun decided to begin supporting a line of products running Linux, they asked DSA to assess the impact of the new OS on training needs for their support people.

DSA's Role

We interviewed a dozen call center and field support people in locations around the world. These people represented six major support roles, including everyone from field engineers, to specialists in kernel, networking and security. In addition, we interviewed Sun internal people from external education services, technology training, storage solutions, system architecture and certification. Our research included marketing materials, online sources, books and articles about the two operating systems.

Deliverables

The final report included numerous recommendations for engineering as well as training development. We found that a number of mission-critical support tools were not available in the new environment and recommended that those be developed. We also recommended establishing new internal channels of communication to keep training developers abreast of developments in the new Linux implementation.

The document included detailed course outlines for a Linux-Solaris differences course, as well as detailed modular contents for a course for those new to Sun. Recommendations included a matrix of modular topics by support role, so that trainees could take only the modules needed for their specific role. An 8-page table documented all command, parameter, and toolset differences between Solaris and Linux. A number of recommendations were made about the variety of media that might be employed to quickly disseminate Linux knowledge to both call centers and the field. Finally, all available Linux certifications were evaluated and recommendations made about the appropriateness of certification for each role.

Pure Software

Needs Analysis

Pure Software is a software company specializing in products that help programmers create higher quality programs.

Darryl L. Sink & Associates was contracted to design an effective training program for new sales employees as well as existing staff. Pure Software did not have an official training program, but Pure plans to use our newly developed program in their newly formed training department.

DSA conducted a Needs Analysis to identify training needs and deficiencies in the current company procedures. DSA interviewed fifteen people from different departments about various work related and non-work related subjects. This resulted in numerous recommendations concerning both training and non-training interventions.

DSA then created an action plan for Pure Software that described the curriculum to implement four different courses we identified:

1. Team Building
2. Database Issues
3. Strategic Selling
4. Product Knowledge

Each course contains six to seven modules that thoroughly describe the process and strategy, which will promote an effective and efficient training program for the Pure Software company.

Sandia National Laboratories

Two Needs Assessment Projects

DSA conducted two Needs Assessments towards the needs for management training and non-training solutions to optimize the transition from cold war strategies to peacetime technologies.

DSA conducted interviews with 21 managers at different levels within the defense sector to determine a list of training and other solutions that could be implemented for the improvement of operations and transition to peace-time technologies.

Many other-than-training needs/solutions were identified.

Training Development Projects Of Particular Note

Caterpillar, Inc.

Call Center Application Training Conversion – Classroom to Web

Caterpillar, Inc. requested the conversion of a 4-hour lab-based, instructor-led, course into a Web-based format. It was critical that the conversion be made without extensive redesign and be implemented using the enterprise E-Learning development tool and LMS recently adopted by the client. DSA recommended a solution that combined training with performance support tools for employee reference on the job. The instructional designer analyzed the outcomes and instructional strategies of the instructor-led course and focused on enabling similar outcomes in an individualized, web-based instructional format.

The final deliverable included five modules of instruction linked to an index of performance support resources. Each module incorporated Flash-based simulations that allowed trainees to enter data and interact with application screens in a manner similar to what they would experience in a classroom lab and on the job. Approximately seven simulations were developed. These were combined with HTML-based content and approximately 24 JavaScript-based criterion-referenced assessment items. Successful completion of both the simulations and JavaScript-based assessment items constituted passing the course. A module-by-module record was sent to the corporate LMS to record their completion by individual employees. PDF versions of performance support resources were linked from the training site to promote their use by employees on the job activities are to be produced within GMD ITTP standards..

Caterpillar Petroleum Transmission Training Program

Caterpillar's Petroleum Transmission Business has been growing exponentially during the last 2 or 3 years, doubling every year. Learning and support services have not existed in the past for the Petroleum Transmission Business. Therefore efforts are underway to develop dealer technician and customer training. The training needs to be performance based and comply with the GMD ITTP standard format.

Caterpillar has requested DSA to provide design and development services to develop approximately 2 days of hands-on lab training, facilitated and led by Caterpillar global trainers. All documents, including a detailed instructor guide, participant guide, slides, lab exercises and activities are to be produced within GMD ITTP standards..

Petroleum
Transmission
Troubleshooting E-
Learning Courses For
Technicians

Caterpillar dealers and customers worldwide have an ongoing need for competent technicians who can troubleshoot and repair the Cat petroleum transmissions. Currently, Cat has developed a petroleum transmission troubleshooting lab (2 days) that is instructor-led. The purpose of the instructor-led lab course is to provide hands on authentic practice at troubleshooting Cat petroleum transmission with a variety of performance problems.

After developing the lab course it has been determine by subject matter experts and trainers that the current prerequisite courses do not focus on the prerequisites required for the lab course but are focused on transmission theory and therefore are not adequately to prepare learners (technicians) for the lab course.

Cat subject matter experts and trainers would like the new e-learning courses to be designed to thoroughly prepare the students with all necessary cognitive knowledge so that the ILT lab experiences can be best utilized for hands-on, guided practice with feedback and not for teaching prerequisites.

The project goal was to refocus and reconfigure the current 3 e-Learning courses (3 hours) into a series of e-Learning courses (eight courses of approximately 20 minutes each) that will enable participants to meet the prerequisites skills required by the Petroleum Transmission Lab Course.

E-Learning Courses
Developed for Cat
University and other
departments include
the following

- Peregrine ServiceCenter Training
- Supplier Relationship Management
- NPI (New Product Introduction) (April 2005)
- Risk Management Basics
- Insider Trading
- Foreign Exchange Basics
- Supplier Capacity Forecasting
- Living the Brand
- 3500 Gas Engine E-learning courses (26 courses)
- Petroleum Transmission E-learning Courses (8 courses) –

Citibank Global Trade Services

Citibank's Global Trade Services Organization, which sells letters of credit and other trade services to customers worldwide, identified that their sales force was not analyzing customer needs effectively. This resulted in missed opportunities and diminished the lifetime value of Citibank customers. The solution identified by Citibank was several e-learning courses that could be integrated into Citibank's existing Learning Management System (LMS).

The DSA instructional designer and software expert began the project by building the technical infrastructure for the courses, which included the user interface design, page templates, learning activities, and SCORM-compliant LMS data exchange. Concurrently, the instructional designer conducted content analysis sessions with one of Citibank's worldwide experts in global trade. From these sessions, the design of the courses emerged.

The design blended case studies, authentic activities, skill-based lessons, and job aids. Media for the course included narrated Macromedia(r) Flash presentations, text-based self-instructional modules, and Adobe .pdf slide presentations.

The key task of the learner was to prepare a 20 minute PowerPoint presentation that presented to a fictional customer the customer's needs and the Citibank solutions that addressed the needs. This presentation was sent to a sales expert for review and learners could review the annotated presentations created by other experts and students for additional feedback

Hewlett Packard

Order Processing
Training
Instructor-led
Classroom/ Hands-on
Lab



Award Winner International Society for Performance Improvement (ISPI) **"Outstanding Instructional Product/Intervention of the Year"**

Darryl L. Sink & Associates, Inc.(DSA) entered into one of its most challenging and complex projects in June of 1993, as we responded to the need for development of three weeks of Order-Processing training, as well as the documentation for this complicated job function. In just 10 weeks, the training and documentation for this job was taken successfully from start to pilot. To give a feeling for the enormous scope of this accomplishment, the Participant's Guide alone paged out at over 2,000, completely filling three 4 1/2 inch binders. Six expert course developers worked in tandem, interviewing 28 Subject Matter Experts and documentation experts all over the country; other vendors said: "This can't be done."

The results of the training are just as amazing: Previously, it took 6-8 months of one-on-one mentoring to bring a trainee up to speed, and then

performance was questionable. After the DSA training (three weeks), the order processors were able to accurately produce 80% of the orders given to them. A ROI study was sponsored by Hewlett-Packard, using an independent firm to gather the data. Order processors on the job for 1 month were tested side-by-side with order processors on the job for 5 years. There was no significant difference in the results. DSA produced the training and delivered the first two pilots of this program. The pilot deliveries were so successful, the client requested additional presentations from DSA through the fourth running of the course.

SLA 4.0 Implementation
Communications
Account Management
Team Special Skills and
Communication Course

This project involved two different, yet related, design challenges. First, DSA designed and developed a communications plan and associated communication materials to accompany the signing of a new service level agreement for IT infrastructure services. Deliverables included announcements, a web-article, and a scripted 90 minute briefing for use in all regions, worldwide. Second, DSA developed a two-session Special Skills and Communications course for Account Executives, Account Service Managers and Account Operations Managers, also for use worldwide. The work involved interviewing over a dozen IT managers in six different countries in order to gauge communications and training needs globally. The medium used for both products was a virtual classroom environment. This environment required the development of minutely detailed scripted presentation and leader guides, custom visuals, and, in the case of the Special Skills course, a participant guide suitable for use with native, as well as non-native, English speakers.

New Hire Training for
Solution Specialists

This project for the HP Operations Division began with an intensive needs assessment study and training content analysis. Based on the findings of these studies, development of a three day leader-led new hire training class for HP's global outsourcing sales force was funded. DSA undertook the project from inception to completion. Course materials included a Participant Guide, an Instructor Guide, visual media (PowerPoint slides, posters, cards, etc.), games, job aids, and course evaluation. Materials were designed to meet the needs of college-level ESL students, as well as native speakers. Additionally, the course was written for easy conversion to web-based training, a potential future modification. DSA taught the course for its beta test, which received exceptional reviews, and trained the trainers as well. Plans are already underway to extend and broaden this foundational instruction, with portions of the course to be presented online.

Introduction to the
Outsourcing Pricing
Guidelines and Policies
Handbook

DSA designed and developed a one-day instructor led product pricing course for HP Outsourcing Sales personnel. DSA worked with subject matter experts to develop an engaging, robust class for presentation globally by a variety of field personnel with little or no training experience. Instructional materials included a Participant Workbook, extremely detailed Instructor Guide, visual media, and course evaluation. DSA conducted the beta presentation and trained the initial set of presenters.

HP QUICK Tool Training

HP Account Quotation Training for HPO Personnel

Training HPO personnel in the use of the QUICK tool and quotation model was the focus of this project. The tool is a computer application that allows generation of budgetary, final and negative quotes for assets, basic, standard, and custom services quickly in response to customer requests. The importance and value of the tool lies in the fact that QUICK quotes are comprehensive, justifiable, and consistent across all regions. The DSA instructional designer worked closely with subject experts as training was developed in parallel with development of the tool. This intense schedule was followed in order to educate users on proper tool use immediately upon its release and to enable quick, effective global implementation. The training consists of two 60-90 minutes sessions and was designed for a HPO global audience of ASMs, AEs, Bid Managers and Project

Managers who work with HP Account customers. Visuals, extremely detailed Instructor and Participant Guides, and pilot and trainer training materials were developed for the chosen instructional medium, the HP virtual classroom.

HP Account Program Updates Account Management and Delivery Team Monthly Webinars

This project required development of monthly 2-hour program briefing/ updating sessions. Topics included detailed explanations of how selected SLA services work technically, what sort of customers would benefit from the services, how services are delivered, when/ where services are available, and so forth. These update sessions ran for seven consecutive months, helping sales and delivery personnel build and refine their SLA services knowledge and expertise. Instructional materials utilizing HP virtual classroom technology were developed as the media most accessible and appropriate for this global audience. Materials included instructional graphics, PowerPoint presentations, and presenter scripts for each briefing

HPO Web Hosting Services Overview

This project began with an assessment to determine account management team needs associated with the release of new web hosting services for sale to internal customers. Responses received from HP Operations personnel in every region were analyzed, and major concerns defined, then refined through interviews with subject matter experts. DSA used this information to design and develop an efficient and highly focused 2-hour briefing session that introduced sales personnel to newly available web hosting services and information resources for those services. Once again, virtual classroom technology was used, with DSA developing several graphic visualizations, a PowerPoint presentation, and a presenter's script for briefing.

Hewlett-Packard- Customer Support and Service Group

Financial analysts within the Customer Support and Service Group (CSSG) of Hewlett Packard are responsible for developing complex financial models twice during the corporate year. These models are used to measure business results. Organizational changes and a

dynamic market place make this task challenging especially for the less experienced analyst.

DSA was contracted to develop a second web-based training course (The first course was a reporting course.) and a web-based performance support system for financial analysts charged with the planning task.

A needs assessment was conducted to determine which topics and tasks were most important and /or most difficult to perform. Based on the results of the needs assessment, 10 training topics were identified as fundamental to the task of planning, and 11 performance support topics were identified as essential for analysts to use in a just-in-time mode as they develop their financial models.

The training modules were modified to make them relevant to the geographic location of the analyst. Thus, programming for this component included a database running in the background. This meant that analysts could log onto the system and view the modules related to their specific geographic location. Managers could run reports to identify which analysts had completed which training modules. Additional reports that computed the evaluation scores and collected comments of analysts as they progressed through each module were also included as a standard reporting option. These reports provided feedback to managers as to the effectiveness of each module. Analysts were also able to run progress reports and were provided with visual feedback on their individual web map as they completed each module.

The web-based performance support system consisted of step-by-step procedures, spreadsheet financial models that could be modified, tips and best practices, flow chart overviews of complex processes, and links to web resources on the corporate Intranet. New analysts found the performance support system especially helpful since financial experts shared their expertise, experience, and financial models in the development of this web site.

A common navigational system was developed for both the training portion and the performance support portion of this project. This allowed analysts to easily move between the two systems but still clearly identify where they were in either system.

Financial Planning Web Tool

The Financial Planning Web Tool is a combination training and quick job aid tool for financial analysts within HP's Software and Services Group (SSG). The Tool contains ten instructional modules and nearly 100 job aids organized by topics and categories like Process Flow Charts, Resources, Examples, Decision Tables and Tips.

The user can be a person new to the budgeting process who takes the training modules as needed. An experienced person can have quick access to the job aids.

Computer Managed
Training System for
Financial Analysts
The PACE course

The PACE course, a web-based training solution, was developed for financial analysts within HP's Software and Services Group (SSG). The content of the course focuses on the skills and knowledge related to financial reporting. The acronym PACE represents the four phases of financial reporting:

- Preparing the numbers
- Analyzing the numbers
- Communicating the results
- Evaluating the process

The course consists of three primary elements: a registration system, curriculum maps, and modules.

Registration System

The registration system is the primary point-of-entry for all learners. It collects demographic information from learners and manages a database that tracks the modules completed by each learner. To log into the system, a learner enters his or her employee number. From that number, the system links the learner to the correct curriculum maps and displays indicators showing which modules were completed by the learner. For administrators of the system, several statistical reports can be generated from the database through the use of a custom-designed Microsoft Excel macro.

Curriculum Maps

Since there are 135 modules in the PACE course, curriculum maps present learners the ideal path for completing modules. These maps are highly visual, with icons that represent the various modules. Clicking an icon links the learner to the appropriate module. After completing a module, the icon on the map is emblazoned with a checkmark, indicating that the module is complete.

The system supports four unique sets of curriculum maps, one for each of the four types of financial report closes. This ensures that the modules that appear on any given map relate to the needs of the individual learners.

Modules

The design of the course incorporates both self-paced modules with structured on-the-job training, as well as a mentoring program. To accommodate this design, the PACE course features three types of modules

Independent Modules

This project began with an assessment to determine account management team needs associated with the release of new web hosting services for sale to internal customers. Responses received from HP Operations personnel in every region were analyzed, and major concerns defined, then refined through interviews with subject matter experts. DSA used this information to design and develop an efficient and highly focused 2-hour briefing session that introduced sales personnel to newly available web hosting services and information resources for those services. Once again, virtual classroom technology was used, with DSA developing several graphic visualizations, a PowerPoint presentation, and a presenter's script for the briefing.

These modules provide content related to processes, procedures, and

concepts. These modules are self-contained and can be completed by learners without assistance. In addition to content presentations, these modules typically include scenarios, multiple-choice self-check questions

Facilitated Modules

For content that involves higher-level problem solving skills, facilitated modules provide both content and an open-ended case study activity. After the learner completes the case study, he or she meets with a mentor to discuss the case and debrief the results. To aid the mentor, the module includes instructions for the mentor on how to debrief the case study.

Activity Guides

Financial analysts use many different computer systems. Additionally, the methods and processes used by financial analysts vary based on the business and geography the analysts support. To accommodate these nuances, Activity Guides aim to localize learning by engaging the learners in structured on-the-job training activities. The Activity Guides provide both the learner and his or her mentor the instructions and resources for completing and debriefing the activity

Embedded within each of the above modules are job aids that provide just-in-time knowledge for common tasks and activities. Each module also features a Click When Done button. By clicking this button, the system links learners to an short, optional evaluation form. After completing this form, the database updates the learner's profile as having completed the module and stores the evaluation data in a secondary, anonymous database.

Other Features

The PACE course also features:

A Preferences page that allows the user to choose which set of curriculum maps to use

An index that lists all modules within the PACE course

A search engine that allows learners and mentors to find specific modules, content, and job aids

A self-paced mentor training program

The AGO Performance Support System

Hewlett-Packard contracted DSA to design and develop a web-based performance support system for financial analysts in the Americas Geographic Organization. The requirements for this system included the following:

- ◆ The performance support system must answer 80% of the questions a new analyst would ask or need to know to perform their job.
- ◆ The performance support system is easy to maintain and scalable so that new topics or elements can be easily added.
- ◆ Any performance support element is no more than “two clicks” away.
- ◆ A powerful search engine is included that allows for searching both within the performance support system and within HP’s corporate intranet.
- ◆ Navigation is intuitive and allows the user to identify where they are either in the performance support system or in another web site on HP’s intranet.
- ◆ Download time is rapid for all HP employees.
- ◆ The performance support system links to all relevant information currently included on HP’s intranet.
- ◆ The performance support system conforms to the “look and feel” and standards in place on the corporate intranet.
- ◆ The performance support system is completed within a three month time frame.

Needs Analysis

To ensure that all the above requirements were met, DSA started by conducting an in-depth needs analysis to determine which topics and what types of performance support elements were necessary to include. This needs analysis was conducted by interviewing both new and experienced financial analysts, reviewing documentation and web sites that were currently used by the AGO financial community, and by developing and analyzing a questionnaire distributed to all financial analysts within AGO.

The results of the needs analysis indicated that 13 different topics were considered either critical for new analysts to know or difficult for new analysts to learn. Additionally, 5 different performance support elements were identified as most helpful for new analysts. These were the following:

- Job aids (step-by-step procedures to perform a task)
- Process flow charts (visuals that provide “the big picture” for complex tasks)

- Tips and best practices (Expert advice and consultation on various topics)
- Contacts and Resources (Specific people to contact with questions and/or related web sites that provide more detail on a topic)
- Downloadable files and examples (Files and templates developed by expert analysts that can be modified by new analysts to perform specific tasks or serve as models)

The DSA Team

To ensure delivery of a quality product meeting all of HP's requirements, DSA assembled a team of three developers, a project manager, an editor, a programmer, and a graphic artist. The performance support system consisted of over 120 performance support elements in all. Each topic was covered as specified and downloadable files were either obtained or developed that allowed new analysts to modify the file so that he or she could produce high-quality work products within the first few weeks of employment. Additionally, tables were included in the resources section that enabled users to benefit from other relevant web sites by providing explanations as to what was included in the web site.

A user interface was developed that was very intuitive, ensured that scrolling was kept at a minimum, and download time for all locations on the intranet was rapid. Additionally, a navigation button was added to each page that allowed the user to move between topics from any point within the web site. These navigational tools got very high marks during usability testing.

The performance support system was met with an enthusiastic response from the financial analysts community. Both new and experienced analysts found the system helpful. Analysts began to use the system even before it was formally announced to the financial community!

HP Corporate Environmental and Safety Compliance

DSA partnered with Hewlett-Packard to complete four projects for HP Corporate Environmental and Safety Compliance. The existing Managing Office Ergonomics Reference Manual was utilized to develop a new product called Managing Office Ergonomics- A Manager's Guide. This Guidebook provides Managers with the tools necessary to:

- ◆ Identify Ergonomic Risks
- ◆ Improve the Work Environment
- ◆ Help Employees Work Safely
- ◆ Take Action When an Employee Has a Work-Related Injury

The Reference Manual was streamlined and given a consistent appearance and format. DSA will also be converting this paper-based Reference Manual into an on-line resource for Hewlett-Packard's Intranet.

The other aspect of this project involved the DSA team creating two Guidebooks entitled The Safety Leadership Self-Assessment and The Safety Leadership Self-Assessment Facilitation Guide. The Safety Leadership Self-Assessment is a guide for business managers to evaluate their safety program in several different areas, and to create an action plan to improve those areas. The corporate-wide goal is to have an injury-free workplace. The Safety Leadership Self-Assessment Facilitation Guide is a tool for the facilitators of the pre-assessment meeting for all managers prior to conducting the Self-Assessment.

HP Performance and Development Planning Workbook Self-Instructional Workbook



Darryl L. Sink & Associates was asked to develop self-instructional materials for Performance and Development Planning based on existing training materials from the *Introduction to Management/Coaching and Managing Performance Workshop*. DSA was to assist in providing a tool that would align individual and team objectives with overall business results that drive the business forward.

Hewlett-Packard needed a tool for managers to use in generating initial drafts of their own performance and development plans as well as a model for assisting their employees planning process. DSA produced a self-instructional workbook complete with job aids for writing their first drafts and case studies for contextual models.

A developmental test was conducted in Mountain View, California, to evaluate the effectiveness and usability of the workbook prior to the pilot test. All improvements and refinements were incorporated and a report of this entire process was made.

A Facilitated Workshop was designed as a mentoring session to be held shortly after participants complete their first drafts using the *Performance and Development Planning Workbook*. During the facilitated workshop participants review concepts, receive feedback on their drafts, learn to evaluate sample drafts, and revise their plans accordingly.

Guide to Vendor
Selection: Hewlett-
Packard

DSA was asked to write a guide for HP to use in selecting a vendor for Instructional Design Projects. The Objectives for the Guide include:

Module One– Vendor Identification and Pre Qualification:

Using a clear definition of work to be outsourced, create a list of pre-qualified vendors in either of two situations:

1. Immediate time-urgent need
2. An anticipated future need.

Module Two–Vendor Selection

Identify those vendors whose approach, process, quality, and expertise meet all necessary criteria, then decide on your top vendor according to cost/benefit and degree of risk.

Module Three–Monitoring Progress

Using scheduling charts, work process outputs, prototypes and finished products, regular reports and meetings, and well defined deliverables, monitor and make any adjustments with the vendor to complete the work on time, within budget, and to specification.

Module Four–Evaluating Quality During The Project

Assess the quality of the work products being generated by the vendor and HP team members and to approve or take corrective actions where appropriate.

Module Five–Project Evaluation

Identify ideas for continuous improvement and to recognize outstanding achievement by comparing what was planned and what actually happened in three project domains: results, processes, and resources.

Contracts
Administration
Instructor-led

DSA was hired to restructure a three-day course developed in-house by the client, when learners were unable to perform following training. DSA designed and developed a performance-oriented course emphasizing expert demonstration, guided practice and frequent evaluation of learner performance using authentic tasks and materials.

Learners were new and experienced Order Processors and Coordinators. Course topics included creating and administering purchase agreements, reviewing orders for compliance with HP's contract terms, and reviewing bid requests. Tasks included communicating with customers and HP personnel, processing hard copy documents, and use of computer systems for decision-making and document generation.

PeopleBase HRMS
Software Training
Instructor-led /self
instruction

PeopleBase/HRMS is the central foundation of Hewlett-Packard's U.S. People Management System. PeopleBase/HRMS is a software application for PC computers that runs under Microsoft Windows. PeopleBase/HRMS accesses a central HP 3000 ALLBASE/SQL database that supports such HRMS operations as personnel and payroll administration, time collection, and collecting employee benefit data.

The PeopleBase/HRMS software application allows HP's personnel and payroll administrators from across the United States to access, add, update and generate reports on employee records, benefits, compensation, time collection, payroll, performance evaluation and Affirmative Action information. Phase One of the PeopleBase/HRMS implementation replaced the current functions supported by the HRIS, and DEDB in September 1992.

The estimated number of people taking this training is currently 9000.

Phase Two of the
PeopleBase/HRMS

Phase Two of the PeopleBase/HRMS implementation strategy was to roll out end user training, and system maintenance administrators' training to approximately 44 HP sites.

This program consisted of a three-day instructor-led course complemented by self-paced course materials. This program instructs representatives from Records & Benefits, Compensation, Affirmative Action, and payroll departments on how to add and update employee personnel files using a corporate mainframe personnel database. The target audience consists of 520 end users throughout the United States.

Final deliverables included: A Needs Assessment, User Reference Guide, a Quick Reference Guide (Job Aids), Leader's Guide with Slides, creating the actual business forms to be used to "fill in the blanks," the On-Line Help System screens, a tutorial of the use of Windows, a Train-The-Trainer Session, and Training Delivery.

Object Oriented
Programming Seminar

DSA developed, with HP and industry experts, a one-day seminar for software engineers, systems analysts, project managers and department managers. The seminar taught object-oriented concepts and terminology. Two case studies on object-oriented projects were covered in detail. The seminars were presented in the US and Canada and featured four renowned industry experts as presenters.

DSA managed the design and production of the brochures announcing the seminars. DSA also produced the binders (including artwork) for this seminar.

The Market Research Symposium Workshop

The Market Research Symposium offered four courses on market research and slides, individual and group activities, role play(s), and a Leader's Guide. The courses were titled: Management Market Research, Choice Modeling and the SUMM Technique, Conducting Customer Visits, and Survey Research.

DSA provided an expert instructional designer to work with HP staff to develop a workshop introducing their new graphic layout design concepts. Our designer advised on the overall format of the workshop and wrote a script for the Workshop Leader's presentation.

TQC Office Measurement Reference Manuals

DSA developed two manuals for Hewlett-Packard: The first involved transforming a draft that had been written by a Subject Matter Expert, *Using Integrated Office Systems: The Advantages of Office Automation—A Reference Manual*, from a difficult-to-use printed work into a reference manual that is easy-to-use and understand. The second manual, TQC Office Measurement Manual, began as four separate reports, each written by different authors. DSA used these materials to write a 93-page manual for HP's Office Systems Research and Development group. The manual describes six methods for measuring productivity in an office.

DSA was asked to create an online tool to guide the AG Consulting staff and consultants through the process of aligning professional development plans to organizational goals. A Performance Plan is a formal plan used to define professional objectives within the context of corporate and organizational needs and objectives. A Professional Development Plan is also a formal document, used to define the acquisition and development of the knowledge and skills required to meet current and future business, personal, and professional needs and goals.

The tool DSA designed helped employees of AG Consulting to:

- Define and describe professional objectives,
- Demonstrate how the objectives meld with business needs and objectives,
- Plan how they would acquire and develop skills and knowledge necessary to meet professional goals and the demands of evolving corporate and industry needs, and
- Create powerful motivators and sturdy, realistic aids in personal and professional growth and achievement.

The process used to create the tool consisted of three stages, the first two were the primary responsibility of DSA and the third (programming the tool to work in the Lotus Notes environment) was completed by AG Consulting's staff.

1. DSA analyzed the planning process flow at AG Consulting and articulated how the planning chain now works compared to any desired changes. Outcomes were a clear illustration of the planning chain and process as desired at AG Consulting for use in developing the content for the professional development planning tool, and the formalizing of a development and planning process at AG Consulting.
2. DSA then designed and wrote the content in consultation with designated content experts within AG Consulting.
3. The tool was then put online using Lotus Notes.

Learning Tree International

RealityPlus™
Increasing Value
Through Performance-
Based Training (32
courses redesigned or
developed)

DSA was given the challenging opportunity to redesign 32 instructor led courses (2 day to 4 days in length). Why? To differentiate Learning Tree's management courses from other competitive offerings. The goal was to make the design of the courses so strong as to give Learning Tree a competitive edge as a provider of training for managers. The program was named RealityPlus™.

The first course of the 32 that DSA developed, Gathering User Requirements, Course 315, later won the ISPI Award for Instructional Design.



Introducing RealityPlus™

RealityPlus™ is a new sub-brand for Learning Tree courses. It was conceived in late 2005 by a team of Learning Tree authors, product managers, and external instructional design experts (DSA). Their challenge was to develop a new course experience that enhanced Learning Tree's renowned course quality, while defending against competitive threats such as commoditization, imitation, and price erosion.

The strategy this team employed focused on the attendees' experience in the classroom. The team conducted interviews with customers, instructors, attendees, and the sales force to figure out what kind of experience attendees desired and needed. They analyzed competing courses and mystery-shopped Learning Tree's own products. They then took the insight they gained and aligned it with established, research-based instructional models, processes, and strategies that focus on performance. The result is a customer-driven, research-based approach for creating efficient, effective, and appealing learning experiences.

Foundations of RealityPlus™

The heart of RealityPlus™ is *performance-based training, which focuses on practical skills*. Using this approach, we design learning experiences to strongly align with the on-the-job tasks people perform in the workplace. Performance-based training is different from *topic-based training* in that courses do not teach a body of knowledge emphasizing facts, concepts, and other abstract content. Rather, course-based experiences focus on teaching attendees the real-world skills they need to immediately be productive when they return to work.

The engine behind performance-based training is simulation. Courses that focus on hard skills such as project management, user requirements, and risk analysis, employ *production simulations*. These simulations engage attendees in the design and development of one or more products aligned with the focus of the course. Production simulations typically engage attendees for multiple days and can have computer-supported components that add variability and dynamics to the simulation.

Soft-skill courses such as communication, assertiveness, and negotiation employ a different type of simulation called *fluency simulations*. Rather than one simulation that spans several days, these mini-simulations (no more than an hour) provide a variety of realistic situations in which attendees practice skills repetitively for speed, accuracy, and confidence.

While simulations offer the “glue” that holds the learning experience together, Reality Plus courses integrate a host of other innovative instructional strategies that improve the efficiency and effectiveness of learning new knowledge and skills, such as:

- *Interactive lectures, which* engage attendees as active learners during instructor-led presentations.
- *Joggles* – short activities that put attendees in surprising situations – help examine issues from different viewpoints and perspectives.
- *Authentic examples, which* give participants attendees a clear picture of the work products they’ll create.
- *Collaborative activities* involving 3x5 cards, sticky notes, and other common materials that provide opportunities for attendees to elicit and share customer knowledge and best practices

State of Alaska

Alaska Computer
Training Series
Training
video/ computer
software/ instructor
led program



The *Alaska Computer Training Series* program is a comprehensive course that was designed to instruct educators on how to utilize personal computers in an educational environment.

The *Alaska Computer Training Series* program consisted of a 16-hour computer literacy instructional program that features 9 video programs, 15 software disks, a 169-page Participant Workbook, and a 175-page Instructor's Guide.

DSA conducted the analysis, design, development, production and distribution of more than 70 copies of this program to educators working with the Alaskan Department of Educational Technology and Telecommunications.

South-Western Publishing Company distributed this DSA instructional program under the title, *New Horizons: The Educator's Computer Literacy Series*, and has made this popular program available to educators throughout the world.

New Horizons was awarded the 1986 Outstanding Instructional Product Award from the International Society for Performance Improvement (ISPI).

Other Notable Projects

Amdahl

Administrative Systems Training: Needs Analysis

Instructor-led
training courses

Amdahl Administrative Systems (AAS) Training consisted of 3 instructor-led courses supporting internal users of a company-wide management information system. Courses developed included AAS Contracts and Billing System Training, AAS Conversion Training, and AAS Inquiry Training.

AAS Contracts and Billing System Training involved processing contracts and customer invoices using the Amdahl Administrative System.

AAS Conversion Training concerned implementing a performance-based auditing system to regional contract and billing administrators throughout the United States.

AAS Inquiry Training dealt with how to use the AAS to inquiry finance and product information for finance and marketing analysts within U.S. Operations.

DSA conducted the needs analysis for all these projects. DSA was responsible for designing, writing and testing all of the training materials, including the Leader's Guides, Participant Guides, transparencies and job aids.

Apple Computer, Inc.

Global Weekly Planning Training and Implementation Instructor-led

One year after Apple implemented *Global Weekly Planning* (formerly *ERP*), DSA was asked to return to perform a two phased update to the training materials to reflect how business processes had changed and evolved, as had Apple's understanding of the new processes.

In Phase One the mission was to condense and rearrange the existing materials, update them to account for new processes, and write additional new materials to address advanced user's needs for a Train-The-Trainer session. Train-The-Trainer in this sense means to train non-training people how to deliver training.

Deliverables also included developing an implementation plan that would create a team of self-reliant trainers to deliver training as needed in various world-wide sites, and who would be responsible for maintaining the materials under the supervision of the world-wide process owners. DSA also developed Module Post-Tests and rigorous Assessments for use in certification. This update was primarily designed to get the materials into shape to be used by non-training professionals. Subject matter accuracy and ease of use would be evaluated during the Train-The-Trainer session. This session was designed to give the trainers-to-be, people out in the field who are using the new system and processes, practice and feedback on delivering training.

In Phase Two, following the Train-The-Trainer session, information collected from the new team of trainers was incorporated. Also, we were asked to spend three weeks interviewing four Subject Matter Experts to collect additional information to substantially revise the materials. This resulted in a nearly complete re-write of the training materials, including a complete re-formatting, the creation of numerous new tables, diagrams, illustrations and text, and revisions of all test items, all to increase accuracy and ease of use by the non-professional trainers.

Enterprise Resource
Planning (ERP)
Instructor-led

The purpose of these courses, called *Enterprise Resource Planning*, was to educate Apple employees about the systems and processes Apple was adopting for new business practices. This included the introduction of new business processes and planning systems to Apple Business Planners, explaining the relationships between the existing and the new processes and systems, and providing the background information and understanding so the planners could successfully accomplish further training using the new system and ultimately, their jobs. This training consisted of 5 days of instructor-led classroom training, with hands-on activities and practice.

Central OEM Training
Procedures
Documentation and
creation of training
materials

This project with Apple was to design, develop, and document many of the procedures for Apple's Central OEM Buyers & Planners. After the training was developed, DSA created training materials for Central OEM to use to train the Buyer/Planners on the new systems.

Database Training
Instructor-led courses

Apple Database Training consisted of 14 one-day instructor-led courses, and several ½ day modules supporting end-users of a company-wide information warehouse.

Courses developed included Forecast and Response, Standard Margin Analysis (SMA), Decision Support System (DSS) Basics, MacDSS, Graphical User Language, Finance Reporting, Finance Reporting: Mainframe, Finance Reporting: Macintosh and Products

Reporting. Modules developed include Financial Statement Generator, Actual Load Close, and Generalized Load Utility.

In addition, DSA produced an hour-long HyperCard stack called *Passage to ADB* that introduced new users to the Apple Database.

DSA provided all of the design, development and production services to CWISS for 17 months. Development included Leader's Guides, Participant Guides, PowerPoint Slides, activities and job aids.

All training materials were produced for Technical Training & Communications, Information Systems and Technology (IS&T), and Corporate Wide Information Systems (CWISS) at Apple Computer, Inc., in Cupertino, California.

Bechtel Corporation

Front Line Management Series

All of the following courses developed for Bechtel are a part of their Front-Line Management series and have certain similarities: They are all packaged and ready to be sent out to the field—nationally and internationally, with *completely scripted* Leader's Guides. The legal ramifications of most of these subjects mandate having the presenter adhere closely or exactly to the wording in many cases. Bechtel does not want people off the job any more than absolutely necessary, but requested involving learning activities to keep the classes interesting and reinforce important points.

How to Recognize, Prevent and Resolve Sexual Harassment Instructor-led

This is a two hour course that instructs participants on how to take appropriate action when faced with sexual harassment situations. Designed for managers and supervisors, this program provides opportunities for practice through a series of learning activities.

Deliverables include a scripted Leader's Guide, Participant's Booklet, and masters for flip charts and slides.

DSA has kept the rights to this program and has a generic version for purchase by other companies. The "generic" version is currently used at Sun Microsystems. (Generic is not entirely accurate—each company using this class must customize it somewhat with that company's policies, phone numbers for who to contact, etc.)

How to Comply with
EEO, Affirmative
Action, and Related
Legislation Instructor-
led

A two hour course helping managers and supervisors comply with the legislation that assures equal employment consideration without regard to race, color religion, sex, national origin, age, disabled or Vietnam-era veteran status, or physical and/or mental handicap. Deliverables included a scripted Leader's Guide, involvement activities providing practice, a Participant's Booklet, and masters for flip charts of slides.

ADA-Americans with
Disabilities Act
Instructor-led

DSA developed the scripted Leader's Guide, Participant's Guide, overheads or flip chart masters for this two hour program that teaches the basic requirements of ADA, the penalties for non-compliance, and the opportunity presented by employing people with disabilities. This training ensures compliance with the Americans with Disabilities Act of 1990.

Deliverables included a scripted Leader's Guide, involvement activities providing practice, a Participant's Booklet, and masters for flip charts or slides.

Injury and Illness
Prevention:
(Ergonomics and VDT
Training)
Instructor-led

Developed as a one, two, or three-hour course, this is developed for all company personnel, to help meet the California Health and Safety Training requirements. The course targets major health problems, disseminates HAZCOM procedures, and teaches ergonomic adjustments that can be made to a computer workstation.

Deliverables included a scripted Leader's Guide, involvement activities providing practice, a Participant's Booklet, and masters for flip charts or slides.

Staffing and Personnel
Policies
Instructor-led

A four-hour instructor-led program for managers on staffing and personnel policies at Bechtel corporation, the product consists of a scripted Leader's Guide, slides, slide masters, and a detailed Participant Guide. The product took a case-study approach to help participants relate the staffing policies and procedures directly to their real-world jobs at Bechtel Corporation.

DSA developed the Leader's Guide, Participant Workbook and overheads for this entry-level course for new supervisors. The modules include instruction and activities on Planning, Scheduling, Organizing, Directing, Process Improvement, Evaluation including detailed instructions on PERT charting, and Gantt charting. The Leader's Guide is completely scripted, with participant materials, masters for overheads or flip chart. This class is six modules, or one day, in length, and was designed to be presented either all at once or one to two modules at a time.

Boeing DCAC/MRM Restoration Training Event

Darryl L. Sink & Associates, Inc. was hired for consulting and technical courseware development in support of the Boeing Distributed Computing project for the Support Staff training. The course assigned to DSA was the Restoration Course. The deliverables for the 2 courses included:

- A detailed design document
- A detailed instructor guide and a detailed student guide, following Boeing's standards for document format and information.
- The training included hands-on case-based practice, procedures and job aids.
- Course evaluation forms
- Try out and revision of the materials

The deliverables had a demanding timeline of 5 weeks. DSA's metric for the instructional development effort was just 24:1.

The efforts of DSA's developer, Dr. Rosemary Greene, and Dr. Sink's guidance and consulting yielded materials of such high quality that the materials were used as a model for other contract developers to follow that had less background and experience.

Many Boeing people had input into the project helping to make it a very successful project. The following is an excerpt from a letter to Peter McGuire, DSA's contracting contact for the project by DSA's developer, Dr. Rosemary Greene, thanking the Boeing team for their involvement in making the project so successful.

"The generous assistance I was given by the first SMEs who met with me, including Dave Seibert, Lori Saunders and Dale Weiss set the tone for the rest. They provided both information and names of other knowledgeable people to contact. Doug Hauser was of great

assistance in smoothing the way for those contacts and setting up[meetings with SMEs. As a result, every meeting was highly productive. The SMEs in Auburn Skin & Spar, Louella Martin, Rodney Retzlaff, Mo Escalante and Christie Journay, were particularly helpful and attended the meeting despite picket lines. All of Gladys Lyons' staff in Bellevue have been very supportive. When I requested information on DCAC/MRM hardware/software, they facilitated a meeting with Toxie Case and Christina Tollenaar. Toxie and Christina provided me with not only general guidance on Restoration testing in the lab, but also gave me written documentation. Having the documentation allowed me to do some of the development work off-site thus saving on travel expenses.

Your staff have been the most helpful of all. Gary Weber and Debbie Blomberg have been especially responsive. In spite of many demands for their time, they have responded to every request I made with a positive and enthusiastic attitude. In particular, the support that Debbie has given me went well beyond the expected. She has been consistently pro-active, anticipating what was needed, and then proceeding to get the tasks done quickly and effectively. I was also very impressed with John Meister's expertise and abilities during the hand-off meeting earlier this week. Even though he had never seen the draft course materials before, he was able to very quickly pick up the basic structure of the course and contribute some excellent suggestions for optimizing the current training design. With his strong technical background, he seems an ideal choice to teach the Restoration course."

As can be seen from Dr. Greene's letter, this was a cooperative effort. It also is a testimonial to the careful match of expertise needed for a particular project and the quality professionals Dr. Sink is able to provide.

State Of California Department Of Youth Authority

DSA developed courses for the California Youth Authority Training Center to use in the Basic Academy for officer training. The training materials were to be approved by the Youth Authority Training Center Curriculum Review Committee and The Commission on Correctional Peace Officer Standards and Training (CPOST). Criterion referenced principles and testing procedures were to be strictly followed. All DSA courses past CPOST approval.

The course materials consisted of scripted leader guides, detailed participant guides, all activities and two mastery criterion referenced tests. In addition, Dr. Sink provided training for the Youth Authority Training Center Staff on instructional design and criterion referenced testing.

The courses developed were as follows:

- Field Visits (6 hours)
- Emergency Response (4 hours)
- Prevention Strategies and Tactics (8 hours)
- Infectious Diseases (4 hours)
- Force Option Simulation (4 hours)
- Anger Management (4 hours)
- Overview of Public Service (4 hours)
- Commitment Process (2 hours)

FlexiInternational Software, Inc.

FlexiPayables Training and Certification Instructor-led training course

FlexiInternational Software, Inc. asked DSA to update and improve the training associated with a new release of FlexiPayables, the accounts payable portion of the FlexiFinancial program suite.

The course was to be offered to external customers, internal customers and Flexi Partners. It was designed to be presented continuously by Flexi training professionals as part of the extensive FlexiInternational curriculum.

Specific management goals for the training program included:

- Increased revenue via increased training sales,
- Delivery of a consistent message regarding the FlexiPayables software,
- Creation of training with documented objectives and standards of proficiency,
- Provision of a certification process, and
- Reduction of the Flexi support burden through the effective education of users.

A FlexiPayables Participant Guide was developed which included updated instructional materials, screen shots and process flow charts, as well as a host of demonstrations, supervised hands-on practice activities, and learning confirmation and assessment exercises and checkpoints.

The FlexiPayables Leader Guide presented detailed teaching materials for each of the ten modules, plus helpful insights and presentational hints, and clear cues for presentation of course visual media.

Instructional Visual Media included sixty-two PowerPoint slides including overviews, comprehensive process illustrations and points of emphasis.

The FlexiPayables Certification Process included a pre-test, and a two part end-of-course proficiency certification test. The certification test required completion of a written

component designed to measure cognitive change (i.e. terminology, concepts, organization), and a scenario-based performance component executed within the FlexiPayables application.

Highlights for Children

Operator System
Training
Instructor-led

An instructor-led program for order processors at Highlights For Children in Columbus, OH. The project both documented the procedures for the order processor to follow as well as the training program itself. The product consisted of a detailed Participant Guide containing all the procedures, the Leader's Guide and masters for slides. The project was produced in response to bringing in a new order processing system.

IBM

IBM Tools
Job Aids/Performance
Support System

IBM Tools was designed to help instructional development teams design instruction, with the use of job aids. At the time this was developed, IBM was trying to create a more cost-effective internal education program. IBM discovered that, especially for large audiences, the traditional classroom instruction delivered by content experts is often an inefficient and expensive delivery system. Encouraging the systematic approach to instruction, including a sophisticated approach to selecting delivery systems and media, was a corporate goal. IBM Tools was developed to support IBM's Systems Approach to Education model. Tools helped one of the largest organizations in the world extend the use of human performance technology by providing Tools to aid in the systematic approach to developing instruction. IBM Tools was a non-training solution to a comprehensive organizational need.

IBM Tools was selected as a finalist for the Outstanding Performance Aid Award by the International Society for Performance Improvement (ISPI).

Change and You Touch
screen interactive video

A self-instructional level III touch screen interactive video and Student Guide program, the four-hour program was developed for all employees at IBM towards the purpose of helping them develop a systematic and positive approach to managing change for themselves. DSA's instructional developers worked with DSA associate programmers and video production personnel to write, develop, and produce this comprehensive package. The program consisted of an Administrator's Guide, Study Guide, and touch-screen interactive videodisc and software. Pre-assessment and post-assessment techniques were used to measure both cognitive and affective learning outcomes.

Creating the Future
Touch screen
interactive video

A self-instructional level III touch screen interactive video and Student Guide program, the four hour program was developed for all employees at IBM towards the purpose of helping them generate and implement change ideas. Creative idea-generating techniques were taught as well as a systematic approach for evaluating ideas for change and planning for the implementation of selected change ideas. DSA's instructional developers worked with DSA associate programmers and video production personnel to write, develop, and produce this comprehensive package. The program consisted of an Administrator's Guide, Study Guide, and touch-screen interactive video disc and software. Pre-assessment and post-assessment techniques were used to measure both cognitive and affective learning outcomes.

Informix

New Outside Sales
Workshop
On-line, instructor-led
workshop

Developed a one day workshop for new outside salespeople. The content included Contracts, Finance, On-Line Marketing Support Systems, Pricing, Sales Operations. The On-Line Sales Operations / Administrative System training included using the system to generate a quote and perform product queries, and the role of the sales administrator and how to work with sales administrators. DSA worked with Subject Matter Experts to determine the content and develop the structure of their presentations. Deliverables included leader's guide, participant materials and text for slides.

Intel Corporation

Intel® Business
Solutions Course
Instructor-led
workshop

DSA redesigned the Intel® Business Solutions course to answer new audience and business need requirements specified by Intel. This class was one of five courses required in the Intel Certified Solutions Consultant curriculum and had as its goal instruction of value added resellers in the Intel Solutions Consulting Methodology.

The two day instructor-led class also prepared students for the last examination in the certification series. DSA work included new curriculum development, enhanced presentation design, a structured alpha /beta / pilot testing procedure, train-the-trainer session development and presentation, coordination of material reproduction, and final technical review of certification examination items.

Deliverables included a Leader Guide, PowerPoint slides, a Student Guide, a comprehensive teaching case study demonstrating each step of the methodology, job aids and samples, a presentation template, and examination items.

Lawrence Livermore National Laboratories

Supervisory Training Instructor-led

A one-day supervisory course for entry-level managers teaching security responsibilities, use of procedure and policy manuals, working in a matrix organization, and risk assessment. The product consisted of a scripted Leader's Guide, detailed Participant Guide, slides, case studies and other activities.

Lincoln National Life Insurance Company

Handling Complaints/ Dissatisfaction Project #1

To meet a demanding time line for developing and delivering complaint/dissatisfaction training to all Client Consultants, DSA was asked to provide a highly experienced developer that could both work with Lincoln Life's Subject Matter Experts to design and write the training program, and then present the program.

DSA met the timelines, providing four hours of instructor-led training and a Train-The-Trainer. The deliverables included Participant Guides, Leader's Guide, visuals, and job aids.

Leader's Guides for Life, Annuity and Technology Training Modules for Client Consultants Project #2

Lincoln National Life needed to provide consistent quality training to Client Consultants (Customer Service Representatives) to move towards more self-reliant teams that meet increasing customer demands. To document the training and procedures, DSA's expertise was needed to get the job done quickly and with enough detail to make the training program repeatable by other trainers. In addition, the Lincoln training team was over-taxed with identifying content, procedures and getting ready to present the training for the first time.

DSA responded to this request by providing two instructional developers to be on-site, attending the classes in the morning, then writing the Leader's Guides for that class in the afternoons. This continued throughout the six weeks of the class. As the developers produced and reviewed the Leader's Guides, they also reviewed the Participant Guides, made any recommendations that were appropriate (*e.g.*, improving objectives, adding activities, making sure that the presentations, practice and evaluations, matched the learning objectives).

Participant Guides for
Life, Annuity and
Technology Training
Modules for Client
Consultants
Project #3

At the end of the first six-week class, the Leader's Guides for both the Life and Annuity classes were finished. There was a big gap between the structure, organization, and usability of the (DSA written) Leader's Guides and the participant materials that had been assembled as quickly as possible by the Lincoln trainers. DSA was contracted to write and produce the corresponding Participant Guides and slides for the two classes.

M&M Mars

Sales Training
Curriculum
Sales Training
Consulting and
Training Workshop

As M&M Mars' sales force increases in the marketplace, the approach of one on one mentoring is being replaced by a formal sales training curriculum.

DSA consulted with the client to create a curriculum for the field sales people, and is creating job aids and sales aids for the field sales force. This is an on-going project, and DSA will be creating Management Training for M&M Mars in 1996, as well as training the course designers with DSA's The Instructional Developer Workshop.

Octel Communications, Inc.

Aspen VoiceMail/
Quick Reference Guide

The *Aspen VoiceMail/Quick Reference* is an easy-to-use quick reference of the Aspen User's Manual for the experienced user of the Aspen Automatic SPeech Exchange Network (ASPEN).

DSA conducted the analysis, design, development and production of more than 25,000 copies of this quick reference guide for Aspen VoiceMail users.

This quick reference guide was produced for Octel Communications Corporation in San Jose, California.

Aspen VoiceMail
User's Manual

The *Aspen VoiceMail User's Manual* is a complete reference guide of the Aspen User's Manual for the consumer end-users of the Aspen Automatic SPeech Exchange Network (ASPEN) VoiceMail System.

This 25-page user's manual features an easy-to-use format using staggered tabs so voice mail users could quickly refer to a specific portion of the guide.

DSA conducted the analysis, design, development and production of more than 25,000 copies of this user's manual for Aspen VoiceMail users.

OPCOM

Sales Training Program
Instructor led

Working with OPCOM's Subject Matter Experts, DSA developed a 5 day sales training program for OPCOM's D.I.A.L., a computer-controlled PBX enhancement that provides primary and secondary answering.

Designed to be put on by OPCOM personnel, the course contains a detailed Leader's Guide with slides, a number of group activities and role plays, and a Participant's notebook. Some existing materials were integrated into this course, including the two videoprograms developed for OPCOM by DSA.

QAD, Inc.

Management Forum at
QAD

DSA designed and developed a challenging two days of management instruction as part of the Management Forum at QAD. Working with topic experts and the instructor, we developed a highly participative classroom experience that requires managers from all levels to collaboratively analyze and then apply management norms and corporate priorities to realistic business challenges. The classroom session makes extensive use of scenarios, case studies, instructional games, and learner self-evaluation. The class will be taught globally and is required for all QAD, Inc. managers.

ROLM Corporation

ROLM Systems Data
Concepts
CBT

DSA performed an analysis and design, wrote the script and storyboards, and participated in the developmental testing for training CB hardware and software technicians and designed to work within the CBS data environment. The design for this project was unique in that the videotape produced was a temporary training solution *en route* to an interactive video course. Therefore, the video was produced with the idea of using its segments in the final interactive form.

ROLM Systems Data
Products
Touch screen
interactive video

For the same audience as the Data Concepts course above, this level III touch-screen interactive video program was written and produced by DSA. DSA wrote all the materials and produced the interactive video, the LS coding, and the computer graphics for this four-hour course.

The purpose of this program was to eliminate the need for people to receive basic hands-on training on desktop products. The touch-screen interactive video simulated the functionality of the equipment, therefore eliminating the need to bring people to a central site for formal instructor-led training.

Sempra Fiber Links, Inc.

Fiber-In-Gas Technology Curriculum for Natural Gas Industry Personnel Training natural gas industry workers to conduct all phases of Fiber-In-Gas (FIG) operations was the focus of this project. FIG is Sempra Fiber Links' proprietary process of installing fiber optic cable into live gas utility mains as a low cost means of providing communications infrastructure to local metropolitan business districts. The value of the FIG process is that installation requires only minimal excavations and no interruption of gas service. The DSA curriculum developer worked closely with subject experts to design the curriculum for worldwide on-site delivery by a corps of authorized instructors. The training consists of four courses; one for each level of operations from construction planning and design through pipeline construction, pipeline operations & maintenance, and service delivery to customer buildings. Power Point slides, a high level Instructor Guide, performance tests, quizzes, and several instructional videos were developed for these courses. Since safety is of primary concern for all operations in the natural gas industry, DSA developed a comprehensive battery of performance tests and quizzes to verify that students master all critical skills, concepts, and procedures.

Placing FIG Conduits in Gas Mains is a five day course for gas industry pipeline installation workers. During the course students spend half their time participating in classroom lectures and discussions and half in supervised construction activities. The goal of the course is to provide the students with the skills and knowledge needed to install FIG technology in gas mains.

Building Access through Gas Service Lines is a two day course for gas industry service line installation workers. The goal of the course is to provide the students with the skills and knowledge needed to bring the FIG conduit from the gas main to the customer's building using the smaller diameter gas pipe connecting the two. During the course students spend half their time in supervised construction activities and half participating in classroom lectures and discussions.

Operation and Maintenance of FIG Systems is a three day course for gas industry pipeline operations and maintenance workers. By the end of the course students are aware of the impact FIG has on operating procedures and have practiced key maintenance tasks on FIG enhanced pipelines. Half of the class time is spent in lectures and discussions and half in supervised construction activities.

FIG Technical Office Processes is a two day course for gas industry construction planners and pipeline engineers. The goal of the course is make the students aware of FIG engineering requirements and planning considerations. Half of the class time is spent in lectures and discussions and half in construction planning exercises. The planning exercises use construction blueprints as well as utility asset maps to reproduce real-world construction challenges in the classroom.

Sun Microsystems

Employee Orientation
Course Slide
presentation

The Employee Orientation course included a slide presentation documenting the flow of the manufacturing process in the new facility in Milpitas.

E-mail for New
Employees at Sun
Instructor led slide
presentation and lab

Containing a detailed Leader's Guide, a slide presentation, and student activities and handouts, this four-hour course is for new employees at Sun. With hands-on delivery, this course helps new employees at Sun to participate right away in their company's major form of inter-office communication- E-mail.

How to Use E-mail:
Basic Guidelines
Self instruction

A 65 page self-instructional manual, How to Use E-mail, was developed for non-technical employees at Sun. It provides an introduction to a UNIX-based electronic mail program. This manual can be used alone by employees too far to come to corporate headquarters for the 4-hour E-mail course, or it can be distributed at the end of the course for beginners to use as a review and to use as a starting point for learning to read computer manuals.

Shop Floor
Manufacturing System-
Certification Program
Instructor-led

A two-day instructor-led course with a detailed Participant Guides, Leader's Guide, and transparencies. The project first created a computer simulation of the computerized shop-floor control system at Sun Microsystems. Later as the shop floor control system was operational, the program was developed into a regular instructor-led course, detailed certifications checklists and procedures for certification are specified.

Manufacturing
Employee Orientation
Course Slide / tape
program

This is a slide and audiotape program which is used to give the new manufacturing employee of how computers flow throughout the manufacturing process at Sun and particularly illustrates a state-of-the-art shop-floor control system.

Tandem Computers, Inc.

Decision Support
Solutions (DSS)
University
Instructor-led

DSS University consisted of a week long training to develop the skills of sales people and DSS specialists to design the architecture and communicate with customers about decision support technology. DSA developed four courses and a simulation that was embedded into the entire training as a part of the DSS University and consulted with the design of the technical courses.

DSS Business
Requirements and
Industry Metrics
Instructor-led

This four-hour course reviewed the general and specific business requirements for the following industries: telecommunications, retail, financial, and insurance and how DSS can support business in solving challenges and maintaining a competitive edge. Job aids, case studies, and role plays were used to develop the skills necessary for DSS specialist to communicate with the various business units in organizations.

Data Warehouse Design
Sale
Instructor-led

This four-hour course reviewed the process of prospecting and qualifying DSS clients and the appropriate sales strategies at each phase of the customer buy cycle. A qualifying checklist was developed as part of this course to ensure consistency and the optimal use of Tandem resources to close a sale.

Tandem DSS Resources
Instructor-led

This three-hour course reviewed the roles and responsibilities of the DSS sales team and specialist. As part of the training a resource guide was developed with detailed job responsibilities.

Proof of Capability
Strategies
Instructor-led

This four-hour course reviewed the various ways that Tandem supports the sales team to ensure that the resources and the capabilities are available to tandem customers. Role plays and case studies were developed to model how proof of capability is used to close DSS sales.

DSS SimulationProof of
Capability Strategies
Instructor-led

This four-hour course reviewed the various ways that Tandem supports the sales team to ensure that the resources and the capabilities are available to tandem customers. Role plays and case studies were developed to model how proof of capability is used to close DSS sales.

Sales Planning System
Training Instructor-
led/self-paced
materials

The *Sales Planning System Training* consists of a one-day instructor-led course with self-paced materials on how to use Tandem's Sales Planning System to track the effectiveness of Tandem's sales force, and upgrade the ability to project corporate revenues for future fiscal quarters.

This training program instructs 1000 U.S. sales reps and managers how to create a sales forecast, manager forecasts, and outlooks using Tandem proprietary PS software running on a corporate mainframe environment.

The course materials consisted of six self-paced Participant Guide modules, six Instructor-Led demonstration modules, slides, and a competency-based evaluation design with a customized course evaluation instrument.

DSA was responsible for designing, writing, and testing all course materials during a course pilot, including the Leader's Guides, Participant Guide materials, and slides used in the final PC/AS training implementation.

Call Center Sales
Program
Instructor led Program

The *Call Center Sales Training Program* is a three-day instructor-led course for Sales and Product Analysts on how to assess a client's call center business needs, and make the proper recommendations based on specific hardware, software and professional services offered through the Tandem Alliance Partners program.

This training program instructs 1000 U.S. Sales and Product Analysts how to conduct a business analysis to determine a client's true business needs, derive the call center business functions, select the proper hardware, software and professional services to meet a client's business needs, and refine the hardware, software, and

professional service selections based on additional client information.

The materials produced for this training program included 10 Participant Guide modules, 10 Facilitator modules, slides, hardware/software Reference Aids, and a customized Course Evaluation instrument.

PowerBook Sales Force
Training Instructor led
and self instructional
materials

A training program for the Tandem sales force to use Apple Computer's PowerBooks from the field to perform various applications related to their software needs as a sales representative. The program used existing materials where possible for basic training on how to use the PowerBook and custom training programs for particular applications related to the sales persons job. The program was one and one half days long, instructor led, also using some self-instructional print-based materials.

TranSystems

TranSystems Instructor-led

For TranSystems Corporation, a Kansas City-based civil engineering company, DSA was asked to develop the company's first training program for its consulting engineers. The training program TranSystems envisioned would establish consistency between its numerous field offices and help the company's project managers deliver more profitable projects. Additionally, TranSystems was implementing a new project management software system, which all engineers in the firm needed to know how to use.

The project started with an extensive analysis of TranSystems' project management process. DSA facilitated a process mapping session in which representatives from the various established a common means for managing projects. Once this process was mapped, elements of the process were prioritized and the curriculum began to take shape. DSA then designed the courses, trained two of the firms managers to deliver the courses, and facilitated the implementation of the program.

Three specific courses were developed. The first course, Mechanics of Project Management, spent two days teaching the company's project managers how to write scope of service documents, estimate and budget projects, and manage the quality, schedule, and budget during the project. The second course, People and Projects, focused on the soft-skills side of project management. Topics included Improving Team Performance, Delegation and Communication, and Negotiation. The third course was hands-on skills training for the company's new project management systems. While the business results of the program are not yet available, participants have rated the courses above 4.5 on a five-point scale.

VERITAS Software, Inc.

Online Sales Training Modules

VERITAS Software, Inc. needed to reduce their existing new hires sales training course by 1.5 days to allow their instructors more time with application-level training rather than knowledge and comprehension level training. In response, DSA developed online web-based product knowledge training for sales representatives and service engineers. This training was to serve as a prerequisite course for the instructor-led application-level new hire sales training.

Deliverables included 29 web-based training modules comprised of more than 900 pages of online content—an estimated 20-30 hours of self-paced learning. Modules included 54 ©Macromedia Flash animation objects, 167 custom developed graphic elements, and 369 interactive practice elements. The course design emphasized sound instructional systems design, direct to-the-point presentations, and practice with immediate feedback. Each module included objectives, practice, and feedback and ended with a brief quiz to test critical objectives. The course ended with a 44-question Final Assessment.

voysys, Inc.

Voice Messaging Training for the MVP Instructor led sales training

Darryl L. Sink & Associates, Inc. developed six modules of training for voysys Corporation to be used in the Alpha (1 day) and Beta (1.5 days of training) testing of their new voice-messaging product called MVP.

The training program provided background information about voice messaging and telephony. The instructor-led presentation is targeted for the office product retailers who would be selling the product. The retailers needed to learn how to effectively position, sell, implement, and support MVP with their small business customers. Retail dealers learned about the benefits and features of MVP, and how to offer the voice messaging solution most suited to customer needs. The secondary audience was a group of interconnect dealers, already familiar with selling voice messaging products, but not familiar with the new customer base.

The deliverables included: A detailed Leader's Guide (scripted), Participant Guide with job aids, and procedures, presentation overheads, and a Train-The-Trainer for the workshop presenters.

Washington Mutual Bank

FOCUS System Instructor-led and Web- based training courses

Washington Mutual Bank (WaMu) asked DSA to develop instructor-led and web-based training for the implementation of their re-engineered construction management business processes and new FOCUS system, an internet-based system designed to support their construction management processes.

The instructor-led courses were designed for delivery to WaMu,s regular and contract employees with responsibilities in one or more of the construction management processes. The web-based course was designed for the vendors and contractors who provide construction-related services and /or products to WaMu.

Specific management goals for the FOCUS System instructor-led training program included:

- Delivery of a consistent message regarding the re-engineered business processes, the FOCUS software, and change management issues.
- Creation of training with documented objectives, online demonstrations and hands-on system performance.
- Creation of a FOCUS User Guide, and
- Minimal need for FOCUS support through the effective education of users.
- A five-day course, designed for several types of project managers, was developed to meet those objectives. The performance-based course was guided by real-life scenarios determined by the designers in conjunction with the subject matter experts. Participants used their own practice exercises in order to create, develop, and close their own projects. Other training materials included:
 - A FOCUS User Guide, which included detailed FOCUS system procedures, screen shots and process flow charts. The 750+ page guide, separated in 21 modules, was distributed to all participants for the FOCUS course and currently acts as their sole resource for using the system.
 - The FOCUS Leader Guide, which presented instructional outlines and objectives, key points and procedures for each course, plus helpful insights and presentational hints, and clear cues for presentation of course visual media.
 - Instructional Visual Media included PowerPoint slides for course and module overviews, process flowcharts and points of

emphasis.

- Handouts included hands-on practice exercises, countless job aids, case scenarios and supporting process documents.

The five-day course was also modified to fit the needs of various groups, including separate two-day workshops and overviews for business, real estate, and vendor managers.

The web-based training includes 11 web-delivered modules to provide vendors and contractors with tutorials and job aids to support their ability to perform specific FOCUS system procedures.

As the instructional materials were being finalized, our team of designers was asked to provide the delivery as well. Over a period of six months, we continued to, simultaneously, modify and finalize the materials while delivering the course to over 25 groups ^ a total of over 300 participants - in and around 5 major cities.

Apple Computer

Apple III A Beginning Slide Tape / instructor-led

Earlier projects in DSA's history with Apple include:

The *Apple III A Beginning* program was a product training program that consisted of a three-hour presentation featuring several slide/tape programs, Leader's Guides, Participant Guide Workbook, and hands-on computer software training.

The target audience for this program consisted of corporate buyers for the post-sales training of customer employees.

The *Apple III A Beginning* program featured step-by-step instructions that made the program easy for corporate trainers to present to employees using the Apple III computer.

DSA conducted the analysis, design, development and production of more than 650 copies of the seminar materials for distribution to Apple dealers throughout the world.

Apple IIe A Beginning Multimedia Workshop

The *Apple IIe A Beginning* program was a product training workshop targeted at small-to-large business users of the Apple IIe for post-sales training.

The program consisted of a three-hour multimedia workshop with hands-on computer software training.

DSA conducted the analysis, design, development and production of more than 1,750 copies of the course materials for distribution to Apple dealers throughout the world.

Apple II Plus Education
Sales Seminar

The *Apple II Plus Education Sales Seminar* was a product training program that consisted of a four-hour sales seminar to train teachers and administrators on educational uses of the Apple II Plus computer.

This program consisted of several slide/tape programs, Leader's Guides, learning activities, and hands-on computer software exercises presented in an easy-to-use instructor-led format.

The *Apple II Plus Education Sales Seminar* was designed to be presented by novice instructors.

DSA conducted the analysis, design, development and production of more than 1,100 copies of the seminar course materials for distribution to Apple dealers throughout the world.

Apple III Getting
Organized
Education Sales
Seminar

The *Apple III Getting Organized* program was an advanced product-training workshop. This program was designed to target corporate users of the Apple III computer.

The *Apple III Getting Organized* program consisted of a two-hour multimedia workshop with hands-on computer and software learning exercises to teach how to use the systems utilities functions of the Apple III computer. The program was designed with easy-to-follow instructions so that novice presenters could deliver the training to their own company employees.

DSA conducted the analysis, design, development and production of more than 350 copies of the workshop materials for use by corporate training throughout the world.

Dot Matrix Printer
Manual/Reference
Card

The *Dot Matrix Printer Manual* was developed in less than six weeks to meet the product release of the Apple Dot Matrix Printer.

The *Dot Matrix Printer Manual* consisted of a fully illustrated, 30-page user's guide that showed consumers how to operate, maintain, configure and troubleshoot the printer for use with the Apple II series of personal computers.

A quick reference card was also developed as part of this manual for experienced computer users.

DSA conducted the analysis, design, development and production of more than 90,000 copies of the *Dot Matrix Printer Manual* for consumers throughout the world.

Daisywheel Printer
Manual/Reference
Card

The *Daisywheel Printer Manual/Reference Card* was developed in less than six weeks to meet the product release of the Apple Daisywheel Printer.

The *Daisywheel Printer Manual* consisted of a fully illustrated, 30-page user's guide that showed consumers how to operate, maintain,

configure and troubleshoot the printer for use with the Apple II series of personal computers.

A quick reference card was also developed as part of this manual for experienced computer users.

DSA conducted the analysis, design, development and production of more than 50,000 copies of the *Daisywheel Printer Manual* for consumers throughout the world.

Selling LisaCalc and LisaWrite Instructional Video

The *Selling LisaCalc and LisaWrite* program consisted of a 16-minute video tape that illustrated how to demonstrate the LisaCalc and LisaWrite software programs to Apple dealers.

This instructional video program was produced to help Apple dealers and their staff emphasize the benefits and capabilities of these two software programs.

DSA conducted the analysis, design, development and production of more than 250 copies of the video tape program for distribution to Apple dealers throughout the world. This program was produced for Apple Computer, Inc., in Cupertino, California.

How to Sell the Lisa Computer in a Retail Setting Instructional Video

The *How to Sell the Lisa Computer in a Retail Setting* program consisted of a 17-minute video tape that illustrated how to demonstrate the Lisa computer to Apple dealers.

This instructional video program emphasized the capabilities, improvements advantages, and benefits of the Lisa computer, and how to position this product in a retail setting against other computers on the market.

DSA conducted the analysis, design, development and production of more than 250 copies of the video tape program for distribution to Apple dealers throughout the world.

Fireman's Fund

Love Your Back Training Program Instructor led/slide and audio program

This package was produced to decrease the number of back injury claims received by insured clients. The 2 hour program consisted of audio programs and slides, a detailed, scripted Leader's Guide, and a job aid for each participant. DSA wrote, produced and manufactured the product including packaging the product so that Fireman's Fund could in turn sell the package to their insured clients.